



# STIC EIC 3600

## Search Request Form

Today's Date:

1/23/04

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For 705 Searches list subclass.

Pls. Call 36

Your Name Sieg Chencinski

AU 3628

Examiner # 79531

Room # 7D 25

Phone 305-6199

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Is this a Rush? ☒ YES ☐ NO

SPE's Signature

Is this a ~~first~~ <sup>RCE</sup> action amendment? ☒ YES ☐ NO

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Access # 130505

What is the focus of this search? Please include concepts, synonyms etc.

Attach a copy of the abstract, pertinent claims and your East search strategy. Thanks.

- ① CONVERSION of an investment portfolio in stocks/equities, bonds, etc. into an annuity program for retirement.
- ② ~~OPTIONAL FEATURES~~
  - The conversion period has flexibility for a period of 4 years.
  - Payments to the owner can be made in a combined payment from both portfolios until the original portfolio has been reduced to zero.
  - Various features can be adjusted during the life of the contract.

STIC Searcher

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 File 267:Finance & Banking Newsletters 2004/Aug 23  
     (c) 2004 The Dialog Corp.

Set	Items	Description
S1	186760	(BENEFIT OR BENEFITS OR ASSET OR ASSETS OR INVESTMENT?) (5N- ) (CONVERT? OR CONVERSION? OR TRANSFER?)
S2	435385	(PORTFOLIO? OR STOCK OR STOCKS OR EQUITY OR EQUITIES OR BO- ND OR BONDS) (5N) (CONVERT? OR CONVERSION? OR TRANSFER?)
S3	84317	(PORTION OR PORTIONS OR PART OR PARTS) (5N) (CONVERT? OR CON- VERSION? OR TRANSFER?)
S4	13389	(RETIREMENT? OR GUARANTEE? OR PAYOUT?) ( ) (ANNUITY OR ANNUIT- IES) OR MONETARY ( ) BENEFIT?
S5	30956	(CONVERT? OR CONVERSION? OR TRANSFER?) (5N) (PERIOD OR PERIO- DS OR INTERVAL OR INTERVALS)
S6	138003	(SELECT? OR SPECIF? OR IDENTIF? OR USE) (5N) (PERIOD OR PERI- ODS OR INTERVAL OR INTERVALS)
S7	108472	GOLDEN ( ) RETIREMENT ( ) RESOURCE? OR EQUITABLE ( ) LIFE? OR AXA? - OR HARTFORD ( ) LIFE? OR ALLIANCE ( ) BERNSTEIN?
S8	125	AU=(GOLDEN, J? OR GOLDEN J?)
S9	663425	S1 OR S2 OR S3
S10	110	S9(S) S4

S11	1	S10(S) (S5 OR S6)
S12	31	(S1 OR S2) (5N) S4
S13	0	S12(S) (S5 OR S6)
S14	30	S12 NOT S11
S15	22	S14 NOT PY>2000
S16	16	RD (unique items)
S17	27412	(BENEFIT OR BENEFITS OR ASSET OR ASSETS OR INVESTMENT? OR - PORTFOLIO? OR STOCK OR STOCKS OR EQUITY OR EQUITIES OR BOND OR BONDS) (S) (S3 OR S4)
S18	71	S17(5N) (S5 OR S6)
S19	55	RD (unique items)
S20	33	S19 NOT CONVERTIBLE?
S21	21	S20 NOT PY>2000
S22	300	S7(3N) S9
S23	300	S22 NOT (S11 OR S16 OR S19)
S24	189	S23 NOT PY>2000
S25	111	S24 NOT CONVERTIBLE?
S26	71	RD (unique items)
S27	23	S26 NOT TRANSFER?
S28	0 -	S8(S) S9